CTM Lightning: Quick Start Guide
CTM Portal offers two distinctive views to customize your user experience.

- Galaxy (Default View): Dark Background and White Text
- Breezy: White Background and Gray Text

To set your background, click the Greeting to see theme options and select your preferred theme.
Traveler Tracker

Travel Arrangers

Traveler Arrangers can search, view, and communicate with travelers from within their company.

- To locate a traveler filter by location, traveler name &/or date range.
- Travelers are plotted on the map via geo location by travel sector. i.e. Flight is airport, hotel is hotel address.
- Traveler Tracker uses a technique called ‘clustering’ to allow users to view multiple people at the same location at the same time. i.e. Kennedy Airport.
- Arrangers can view the traveler’s full itinerary details.
- Travel date range can be extended up to 30 days before and 30 days after the current date.

NOTE: The default date range list of travelers is the next 7 days.

Travelers

Travelers can search and view their own past date or upcoming travel.

- To locate a trip filter by location, &/or date range.
- Travel is plotted on the map via geo location by travel sector. i.e. Flight is airport, hotel is hotel address.
- Travel date range can be extended up to 30 days before and 30 days after the current date.

NOTE: The default date range list of travelers is the next 7 days.
Portal’s Widget display can be customized to show or hide by default in the dashboard. (Widgets will remain displayed in the navigation menu for user access.)

To set your display preference click the gear next to WIDGETS to see the available toggles.
Additional Widgets

**NEWS**
View global news that may impact the upcoming travel. View all news listed by date/time from most recent or filter by RISK or CTM.

RISK: Alerts that have been identified as a potential security or safety hazard.

CTM: Weather alerts or general news that could potentially impact travel.

---

**WORLD CLOCKS**
Add clocks in multiple time zones, to help plan arrival and departures, as well as meeting times for calls or events with attendees in various regions.

---

**CURRENCY CONVERTER**
Easily view the current currency conversions and recent exchange trends.
View customized documents and links that you may find helpful when planning travel.

Some links may require you to be logged in to your corporate intranet to be able to access the content. When selecting a document to view a PDF version will be downloaded and can be saved for offline access.

To book travel directly with your CTM Travel Team or for assistance

---

**Travel Contact Sheet**

The following information will assist when booking travel with Corporate Travel Management.

<table>
<thead>
<tr>
<th>TRAVEL TEAM</th>
<th>PRIMARY AGENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OPERATIONS MANAGER</strong></td>
<td><strong>ACCOUNT MANAGER</strong></td>
</tr>
<tr>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>Phone</td>
<td>Phone</td>
</tr>
<tr>
<td>Outside USA</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Email</td>
</tr>
<tr>
<td><strong>HOURS OF OPERATION</strong></td>
<td><strong>EMERGENCY / AFTER-HOURS</strong></td>
</tr>
<tr>
<td>Monday – Friday</td>
<td></td>
</tr>
<tr>
<td>6:00am – 6:00pm PST</td>
<td></td>
</tr>
<tr>
<td>Your Travel Team numbers will pass-through to the</td>
<td></td>
</tr>
<tr>
<td>after-hours service. Emergency After Hours direct</td>
<td></td>
</tr>
<tr>
<td>phone number is 1-877-206-1394.</td>
<td></td>
</tr>
</tbody>
</table>

**ONLINE RESOURCES**

- Support: na_online@travelcm.com
- Website: http://us.travelcm.com

* NORTHERN AMERICA | AUSTRALIA | ASIA | EUROPE | us.travelcm.com

*** Confidential and proprietary information for CTM & Client Use Only ***
Login into the CTM SMART Portal page via URL https://us.ctmsmart.com; click on the CTM Profiles tile to access your traveler profile. Prior to booking your first trip in Lightning, please login to CTM Profiles and update your personal and travel information.
Umbrella Faces - Privacy Policy

Data Privacy Policy for Umbrella Faces
Umbrella Organisation Limited

This privacy policy is to inform you of our policies regarding the collection, use, and disclosure of personal data in the application Umbrella Faces.

This privacy policy applies to the services provided by Umbrella Faces.

This privacy policy examines the following topics:

- Which data is collected?
- How is the personal data collected?
- Purpose of data collection, data transfer, analysis, and reports
- Where is the data stored?
- Disclosure of personal data to third parties
- Security of personal data on public websites
- Who has access to personal data that is stored in Umbrella?
- How long does personal data stored in Umbrella?
- Access to personal data and correction/deletion of personal data

Users who use the application Umbrella Faces are responsible for ensuring that they comply with all applicable laws and regulations. Users are also responsible for ensuring that they are aware of and comply with these policies.

I have read the privacy policy and accept it.
Travel Profile Update

Please review and complete the sections below:

SAVING PROFILE CHANGES AND BOOKING TRAVEL ON LIGHTNING

* When editing the Traveler Profile make sure to click **Save**, on each updated page, before selecting another section.

** If the profile requires any updates to an un-Editable field, please email **CTM Online Support**, for assistance.

*** After the Traveler Profile has been reviewed and updated, as needed please close the CTM Profile browser tab to return to the CTM SMART Portal.

**** To book travel click the **Lightning** tab to open the online booking tool.

*** Confidential and proprietary information for CTM & Client Use Only ***
Select **New Booking**

Tick **Flight**, **Hotel**, and **Car** at the top of the screen as required and add the travelers, destination and times.

If applicable, enter ‘Purpose of Trip’ from the drop-down menu.

Click **Search**
**Flights: Availability**

Flights can be filtered by time of day, or the entire day can be displayed.

* A pop-up box may appear if an out of policy is fare is chosen. A reason for the out of policy fare selected needs to be nominated before continuing.
Flights: Expanded View

Fares are grouped by available Fare Brand Types and Cabin Class. The expanded display links to the fare rules and conditions for each fare offered.

Click **Add to Cart** to select flight and fare.

Click **Seat Map** to view available seats. (Seat selections will be available after purchase.)
The flights selected will appear in the itinerary summary on the right-hand side of the page. The shopping cart will update the total price of the flights, hotel and car selected.

Once a flight has been selected, all other flight options will disappear. To re-display the other flight options, click the trash can icon for that flight.

Click the Continue button to move to the next step.
Hotels: Availability

Best value and preferred hotels will appear first under the ‘Best’ tab, with all other hotels under ‘The rest.’

The default search radius is 5 mi, but can be expanded based on availability and preference.

To see the full list of rooms and rates for each property, please click on ‘Rooms’ or ‘All rooms & rates’ buttons.

* A pop-up box may appear requesting a reason be given for the rate selected if the rate chosen is out of policy. Simply enter a reason why the hotel has been selected.

*** Confidential and proprietary information for CTM & Client Use Only ***
Hotels: Cart

The hotel option selected will appear in the shopping cart, located on right hand side of the page.

If an alternative hotel or rate is preferred, please click the trash icon in the shopping card to redisplay the hotel options and then reselect the required hotel.

Once a hotel has been added into the shopping cart, a note to the hotel can also be sent via the special request field.

Click the Continue button to move to the next step.

*** Confidential and proprietary information for CTM & Client Use Only ***
Cars: Availability

Preferred car rental providers will appear, displayed in price order.

**NOTE:** The rate showed is the daily base rate excluding fees and taxes.

Selecting ‘Car Details’ will display the full rate details and additional information relating to the vehicle selected.

Please click ‘Add Car’ to have the preferred option added to the shopping cart.

* A pop-up box may appear requesting a reason be given for the rate selected, if the rate chosen is out of policy. Simply enter a reason why the car has been selected.

*** Confidential and proprietary information for CTM & Client Use Only ***
Cars: Cart

Once a car has been added into the shopping cart, a note to the vendor can also be sent via the special request field.

To select another car option, please click the trash can icon and reselect the car rate as required.

Click the Continue button to move to the next step.
**Booking Confirmation**

Where & when needed complete any required fields, payment information, approver and loyalty program details.

The comments field can be used to send a note to CTM Operations or Gold Desk to handle any additional requirements for the booking.

To confirm the booking, check the ‘Terms and Conditions’ box and click Confirm Booking.

**NOTE:**
Additional flights, cars and hotels can also be added to your flight itinerary by clicking the icons, in the upper right-hand corner.

Flights, hotels and cars can be removed by clicking on the trash can icon.

Under each flight segment, the lowest price fare alternatives can be swapped by clicking on the fare amount. To revert to the original flight, reselect flight again.

*** Confidential and proprietary information for CTM & Client Use Only ***
To check your approval status, view your booking and/or book your seats click Manage Bookings, otherwise Log Out or create a New Booking, as needed.

*You can also manage your bookings by clicking My Bookings from the Lightning landing page, after logging in to the site from the SMART Portal.
Trip Status and Approvals

- On the Confirmation Page, the use will be required to select their assigned Regional GM, as their Approver.
  - If you are unsure of your region or approver, please consult with your manager.
- The selected Approver must approve the itinerary from the email they receive, prior to ticketing.
- Upon approval, the itinerary will be ticketed, and the confirmation email will be sent.
- Travelers and arrangers can track the trip status and approval in ‘My Bookings.’

Using the search fields, specific bookings can be found by Booking #, Record Locator, Name, or by a specific travel date range.

Trips can be filtered based on status; the default search is for all, but can be narrowed down to a specific status, i.e. ‘Awaiting Approval.’

Orange = Awaiting approval. Approver selected has not yet approved the booking request.
- Approver must approve/decline prior to the Ticketing Time Limit (TTL) otherwise it will auto cancel, and the travel booker will have to start the booking request from the start.

Red = Denied. Approver has declined the booking request.

Green = Approved. Approver has approved the booking request.

Grey = Expired. Approver did not approve or decline the booking request before the ticketing time limit (TTL).

*** Confidential and proprietary information for CTM & Client Use Only ***
Select Seats

Select trip, from trip list to open itinerary and then click Select Seats, on the Booking Summary page.

Click any available seat to Select and then Save & Continue to make your additional seat selections.

*** Confidential and proprietary information for CTM & Client Use Only ***
For additional information or assistance please contact Online Technical Support at 1-877-208-1396, or email at na_online@travelctm.com.